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ABSTRACT

In late 1988, a compact disc cataloging product was introduced to the library market. In order to learn more about the needs of current users, a survey was developed to include questions concerning software features and operations, software enhancements, bibliographic and authority subsets, and hardware issues. This study was conducted among all current North American subscribers who purchased the package prior to January 31, 1990. Of the 127 users identified for this study, 94 were used for data analysis (50% academic, 24% special, 17% public, 9% school). Eighty-two percent of the respondents stated that they like the system or like it very much. Sixty-one percent of users preferred the compact disc product to the online system, and 69% of the users would recommend the product to other users. Much information was gained for product enhancements, along with a better understanding of which functions and features are most used. All of this data has been shared with product mangers and developers for future software releases. Survey instruments are appended. (Contains 12 references.) (Author/TMK)

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ED 367 355

COMPACT DISC CATALOGING PRODUCT USER SURVEY

A Master's Research Paper submitted to the
Kent State University School of Library Science
in partial fulfillment of the requirements
for the degree Master of Library Science

by

David E. Whitehair

December, 1990

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ABSTRACT

In late 1988, a compact disc cataloging product was introduced to the library market. Many suggestions and enhancements have been learned since this introduction, and time has come to incorporate them into the software. In order to learn more about the needs of current users, a survey was developed to include questions concerning software features and operations, software enhancements, bibliographic and authority subsets, and hardware issues. This study was conducted among all current North America subscribers who purchased the package prior to January 31, 1990. Of the 127 users identified for this study, 94 were used for data analysis (50% academic, 24% special, 17% public, 9% school). Eighty-two percent of the respondents stated that they like the system or like it very much. Sixty-one percent prefer the compact disc product to the online system, and 69% of the users would recommend the product to other users. Much information was gained for product enhancements, along with a better understanding of which functions and features are most used. All of this data has been shared with product managers and developers for future software releases.

Master's Research Paper by

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INTRODUCTION

In late 1988, a compact disc cataloging product was introduced to the library market. This microcomputer-based cataloging system uses subsets from an online catalog on compact disc. Combined with access to the online catalog, this product offers users both convenience and cost savings. Due to proprietary nature of this research, specific product or database names will not be used.

This fairly new system expands the options of the online to include many new local-processing options, enabling users to search for and edit records offline on a more flexible schedule. Enhanced searching capabilities include subject access, key word searching, and Boolean logic. Users can perform full screen editing, which has been a dream of online users for many years. Local printing of spine labels and catalog cards is also incorporated in this system. Many users have needed to adapt their workflow to these changes, hopefully making it more efficient.

Currently, six different compact disc packages are offered to subscribers. Each subset is extracted based on date of item, amount of use, MARC format, and/or subject. The first two subsets are extracted based on date of item. First is a two-disc collection containing approximately 1.35 million MARC records. This collection is restricted to book items published during the past six years.

Next is a subset most used for retrospective conversion. These 1.35 million MARC records on two compact discs are items predating the six year cutoff for the previous collection. This includes 85% in book format and 15% non-book (e.g. serials, sound recordings, videocassettes, etc.).

Next are two single disc collections. Each are based on subject

extractions and contain between 650,000 and 700,000 MARC formats of all types. Each subset has been developed to include items most likely to be cataloged in these two types of special libraries.

The fifth collection consists of two discs which contain approximately one million sound recording and score MARC records. Various dates and subjects are included. This extraction is based on format only and includes all records of this type in the database.

The last collection is the complete file of Library of Congress Name and Subject Authority records. Stored on three compact discs, this collection is included with all five previously mentioned sets. All sets, including the authority records, are extracted and distributed quarterly.

Within the next two years, the software used to operate this compact disc cataloging product will require updates to be compatible with impending changes to the online system of this bibliographic utility. Many "wants and desires" have been suggested by users and staff members since the introduction of this product. Product managers felt this to be an excellent opportunity to include enhancements suggested by current users of the software.

LITERATURE REVIEW

As a technology, CD-ROM is a digitally encoded, read-only optical medium, which fits well with the read-only aspects of other publishing media. Schwerin (1986) noted the introduction of major changes in the work environment causes a certain amount of natural resistance by potential CD-ROM users. A strong correlation exists between the number of librarians who have a good understanding of the potential for optical information products and those prepared to take advantage of it. The CD-ROM library market was the earliest to develop, both because of librarians receptivity to technology and because of the attractiveness of fixed-price, local access to machine-readable databases.

In January of 1985, Library Corporation's BiblioFile was the first compact disc cataloging product to be introduced to the library field. Several articles have been written describing the design and functionality of this product. For this discussion, data has been extracted from several of these articles (Bills, 1989; Brennan, 1989; Harrison, 1987; Morrow, 1988).

Designed specifically for cataloging, the BiblioFile software enables users to access MARC cataloging, edit the MARC record, add local data, store the record to a floppy disk or online to the host system's online database, print catalog cards, labels, and/or MARC records, or access previously edited records from a floppy disk. The database consists of the entire Library of Congress English and foreign-language MARC database, consisting of over 3 million records on three compact discs. Formats include monographs, serials, music, GPO publications, film, maps, and audio-visual materials; MRDF and manuscripts are not included.

Searching of the Bibliofile compact disc database includes title, author, LCCN, ISBN, ISSN, and GPO. Truncation is allowed for title and author searches. All searching is done on one disc, which contains the index to all discs in the set. The system queues selections from other discs until the search session is over, when the user can insert other compact discs. The full MARC record is displayed with tag labels, field names, field indicators, subfield headings, and the data.

Editing capabilities include full screen editing, over-type, insert (default), delete character over the cursor, backspace-and-delete, and delete field. After editing, the user may save the catalog card and/or label for batch printing at a later time. The bibliographic record can be stored to a floppy diskette or sent to the host system's online database.

Searching of the stored records is somewhat limited. The software can display a list of all titles on the diskette with title, control number, and number on diskette. Individual records can be requested from the list by control number or record number. Searches such as title or author can not be performed to get directly to a record in the file.

Function keys are defined to assist in performing many functions of the software. Searching the database, editing MARC records, creating original MARC records, displaying catalog card images, printing cards and labels, deleting records from the storage diskette, and saving edited records can be performed by pressing a single function key. For example, if you want to see the catalog card of the current record, pressing the F4 function key displays the image. Pressing the F3 key returns you to the edit screen.

BiblioFile compact discs are updated on a monthly basis. These updates are supplied to users on a monthly or quarterly schedule, depending upon purchase agreement between Library Corporation and the user.

In late 1985, Western Library Network (WLN) set out to develop a stand alone product based on CD-ROM technology. The goals included increasing database use and expansion of database size despite ever-increasing telecommunications costs; producing a distributed product which would benefit the entire network; increasing participation in the network; and maximizing the benefits of a moderately-sized, regional database. Cataloging was an afterthought, not a primary goal, in the development of LaserCat, introduced to the library market in early 1987. By summarizing the published literature on LaserCat, a description of the software is provided. (Bills, 1989; Brennan, 1989; Fink, 1988; Hattery, 1988; Ziegman, 1988).

The LaserCat software provides the ability to search, print catalog cards and labels, create bibliographies, and add holdings to the WLN database. The three compact discs contain over 2 million records for items held by WLN members and a minimum of the two most recent years of LC-distributed MARC records, whether of not they are held by member libraries. Formats include books, film, serials, music, maps and other formats, all under full WLN authority control.

The compact disc database supports author, title, or subject searching through exact, keyword, or browse searches. Numeric searches include LCCN, ISBN, and ISSN retrieval. Boolean searching and truncation is incorporated. Searches may be limited by member library, publication date, material type, and language, as well as by government publications, large print, or juvenile materials only. The full bibliographic record is displayed with MARC tags, indicators, and subfield codes. All subfield codes are marked by vertical lines and clustered to the left of the data. English label definitions are to the left of the MARC tags.

LaserCat does not include editing itself, but can be used with the UltraCard program to edit records and produce catalog cards and labels. LaserCat records are saved to a diskette in files up to 100 records each. These diskettes are used as the source of records for UltraCard editing. Editing capabilities include full screen editing, over-type (default), insert, delete character over the cursor, backspace-and-delete, and delete field. Searching of this local file is by control number assigned when the record is saved. The system will list these numbers on request.

The compact discs include call numbers for all member libraries holding each item. LaserCat users record their call numbers onto a floppy disk which is mailed to WLN for processing. These updates are included in the next revision of the compact discs, which are issued quarterly.

OCLC, Online Computer Library Center, Inc., entered the compact disc cataloging market in late 1988 with the CAT CD450 System. Based upon journal articles and product information, the compact disc product offers users the combination of the compact disc database along with a link to the OCLC Online Union Catalog (OLUC) (Bills, 1989; Bryan, 1989; Iconis, 1989; OCLC CAT CD450 Fact Sheet, 1989; OCLC CAT CD450 Product Specifications, 1989). It enables users to search for and edit MARC records offline, save records to a local file, access previously saved records, print catalog cards and spine labels, and export records to a local system.

Several CAT CD450 databases have been developed on compact disc, each targeted for a specific audience. For items not found on the compact disc collection, users have the ability to access the OLUC to download MARC records to the CAT CD450 System local file on the hard disk. This database includes records contributed from the Library of Congress, other national libraries such as the National Library of Medicine, and from member input.

The compact discs can be searched using keywords from title, author, and subject fields. Numeric search keys include OCLC number, LCCN, ISBN, ISSN, SuDocs number, CODEN, Technical Report number, and Music number. Searches may be qualified by date, language, form of reproduction, cataloging source, and material type. Boolean logic can be applied on any combination of keys. The records are displayed with fields, tags, and indicators displayed. English label descriptors are not provided.

Editing capabilities include full screen editing, over-type, insert (default), delete character over the cursor, backspace-and-delete, delete word, undelete line, delete to end of line, delete field, delete to end of field, delete subfield, and cut and paste. Edited records are saved to the local save file on the hard disk or a floppy diskette.

The local save file can be searched in a number of ways. A truncated list can be displayed of all records in the file, or searching can be done on specific items. Local status code, local record number, OCLC number, material type, source (compact disc or online), author, and title can be searched. Author and title searches are not keyword in the local file as they are when searching the compact disc, but truncation can be applied.

Many applications of the software have been defined on function keys. For editing, this includes cut text, copy text, and clear text, to name a few. The software includes windowing features, and such functions as next window, previous window, and size window are defined by function keys.

The compact disc database is updated quarterly, although users have access to the OLUC, which is continually updated. The combination of these two access points offers a high hit rate to CAT CD450 users.

BiblioFile, LaserCat, and CAT CD450 are successful compact disc products. Each have unique features which have been designed to

incorporate needs of the targeted user. Successful product and market development for CD-ROM relies on knowledge and instinct about the needs of the targeted audience, and also upon an understanding of what technology has to offer. The combination of knowledge of capabilities of similar products, along with an understanding of technology and the needs of the targeted audience, leads to the development of successful and competitive products. This paper reports the results of a market survey designed for such CD-ROM product development.

RESEARCH OBJECTIVES

As a not-for-profit organization providing library services, this cataloging database provider relies upon market research to play an important part in product development and enhancements. Surveys are used to gauge user reaction to existing products. Including user responses assures that their needs are considered in the process. Input from users will help greatly to:

1. prioritize changes and enhancements,
2. decide which features and functions to eliminate,
3. evaluate cost savings,
4. gain an understanding of cataloging workflow strategies, and
5. compile hardware compatibility information.

Many features and functions of the software require much memory for operation. If particular features are not utilized by users, this memory space can be used more desirably. Input from users helps to identify such features and functions, and to gain newly desired ideas. All of this information will help to prioritized such changes and enhancements.

This product's objective is to help libraries reduce cataloging costs and make the cataloging workflow more efficient. By identifying libraries who have experienced positive changes, each can be contacted to gain an understanding of the changes incorporated to make the product such a success. This information can be shared with current and future users to insure similar success.

Hardware requirements for this product include 640K random-access memory (RAM), a 20 MB hard-disk drive, and at least one CD-ROM drive and controller. Compatible hardware is sold by the database provider and user support is available. However, many subscribers do not purchase this recommended equipment. Software testing is only performed on this equipment, so compatibility information must be gained from current users who successfully operate the software on other hardware. This information will assist in guiding possible new subscribers with equipment decisions.

METHODOLOGY

Sample Group

In order to learn more about the needs and product reactions of current users, a survey study was conducted among all current North America subscribers who purchased the package prior to January 31, 1990. The population for this census included 127 users throughout the United States and Canada, stratified among academic (54%), special (23%), public (15%), and school (8%) libraries. ALA accredited library schools, which received the product free of charge, were not included.

At a later time period, a similar survey may be conducted among international users. Factors considered in the decision to exclude international users from the initial survey include language barries, the amount of time they have used the product, and expense of conducting an international survey.

Questionnaire Development/Pretest

To gain input from current users, a survey was developed to include questions concerning software features and operations, software enhancements, bibliographic and authority subsets, and hardware issues. Upon development of the questionnaire, a pretest was conducted of nine randomly selected libraries. A phone call was made to the Director of Technical Services at each site to request consent for their library's participation and to learn the name of the staff member who used the system most frequently.

All nine librarie's agreed to participate in the pretest, and each received the questionnaire in the mail. Each were given one week to

complete and return the form, all of which were received completed. After the results were tabulated, each question was reviewed for clarity to participants. This review was based on responses given and notes added in the margin by the participating institutions.

Only one question was revised and the wording on four choices under various questions was clarified. Five questions required a wording change from "you" to "you or other staff members." Overall, the questionnaire required few changes. During this pretest period, the human subject review process was also completed. Appendix A contains a copy of the questionnaire.

Implementation

After revision of the questionnaire, all current users throughout North America who purchased the system prior to January 31, 1990, were contacted to gain consent of participation in this census study. The original list contained 127 institutions. Subscribers were not asked if they currently use the software; as long as they met all previous restrictions and had a current subscription, they were asked to participate. Only users who asked to be excluded because they had not used the software were excluded.

Of the original 127 institutions, nine had participated in the pretest; seven had not used the software yet and asked to be excluded; five did not own the system; and four could not be reached. The remaining 102 institutions agreed to participate and questionnaires were mailed. Over the next four weeks, 89 were returned. This success was attributed to the methodology of notifying each participant prior to the mailing and placing follow-up telephone calls to institutions which had not returned the survey.

Four of the returned surveys were not included in the final count. One was a library school, which was excluded from the initial group; one was returned blank with a note that not enough experience had been gained to answer; and two were not current subscribers. This brought the number of usable surveys to 85. Along with the nine returned in the pretest, 94 questionnaires were studied for the data analysis (50% academic, 24% special, 17% public, 9% school). These responses represent 79% of the 119 libraries which met the initial population restrictions set for this study.

RESULTS

The majority of the survey participants have been using the product for less than one year (86%). After installing, 67% were using the product for daily cataloging within four weeks. Sixty-two percent of the users catalog over 80% of their current materials using the compact disc product. Table 1 expands on this information.

TABLE 1

USE OF THE PRODUCT

Number of months in use	Number	Percent
0-6	31	33%
7-12	49	53%
13-18	11	12%
19-24	2	2%
	93	100%

Number of weeks for full implementation	Number	Percent
1-2	39	45%
3-4	19	22%
5-6	4	5%
7-8	12	14%
9-10	4	5%
11-12	3	3%
13+	5	6%
	86	100%

Percent of current cataloging	Number	Percent
0	13	14%
1-20	7	8%
21-40	1	1%
41-60	5	5%
61-80	9	10%
81-100	57	62%
	92	100%

Upon further analysis into the 13 libraries which reported that none of their current cataloging is done with the system, it was discovered that six of these respondents had not yet used the software; two were having installation problems; one had exporting problems with their local system; one used the product for retroconversion only, which was not considered current cataloging; and three did not like the system and were no longer using it. These users were included in the study because their annual subscription was still current.

Most participants (58%) use the product on supported hardware available through the database provider. Ninety-four percent own some type of a Hitachi compact disc drive. The majority have two cd drives (48%), with 29% having one drive, 18% having four, and 5% having three. As stated in Table 2, only 29% of the participants have an automated local system, but 53% plan to purchase one. Appendix B lists the system vendors current users own, as well as other equipment used with the CD ROM catalog product.

TABLE 2

AUTOMATED LOCAL SYSTEM

Status	Number	Percent
Yes, currently own	27	29%
No, but plan to	50	53%
No, with no plans to	10	11%
Don't know	7	7%
	94	100%

Overall, current users of the product were very pleased. As demonstrated in Table 3, 82% of the 94 users stated that they either like it or like it very much; 13% neither like it nor dislike it; and 5% either don't like it or don't like it at all. Sixty-one percent stated that they prefer the compact disc product; 21% prefer the online; and 18% had no preference. Eighty-eight percent of respondents included in Table 4 either did not change their workflow or changed it to a more efficient way.

TABLE 3

PRODUCT RATING

OVERALL

Rating	Number	Percent
Like it very much	41	44%
Like it	36	38%
Neither like it nor dislike it	12	13%
Don't like it	4	4%
Don't like it at all	1	1%
	94	100%

PREFFRENCE

Product	Number	Percent
Compact disc product	56	61%
Online catalog system	19	21%
No preference	17	18%
	92	100%

TABLE 4

WORKFLOW

Status	Number	Percent
Workflow did not change	26	30%
Workflow changed/more efficient	52	58%
Workflow changed/less efficient	11	12%
	89	100%

When asked why the product is liked or disliked, respondents listed 134 reasons. As Table 5 illustrates, 79% of the responses were positive, with the features of the software, the ease of learning, and savings of money and telecommunications being the top responses. On the negative side, speed, features of the software, and unreliability are the top responses.

When asked if the main goal for purchasing the product was achieved, 71% stated that it was achieved, 13% said it was not, and 16% do not know at this time. The main reason for purchasing for most users was to reduce telecommunications cost (43%). Twenty-three percent listed improving efficiency of cataloging, 10% stated flexibility, with another 11% wanting nonprime-time access to the online catalog.

TABLE 5

REASONS LIKED OR DISLIKED

Positive Reactions

	Number of Respondents Reporting
Features (editing, cards, etc.)	20
Easy to use	15
Saves money/telecommunications	15
Combination offline/cd's with online	13
Hitrate	10
Searching capabilities	11
Speed/workflow	10
Batch processing	7
Flexibility	5
	106

Negative Reactions

	Number of Respondents Reporting
Speed	8
Features (cards, local file, etc.)	5
Unreliable	5
Downloaded mismatches	4
Workflow changes	3
Poor telecommunications	2
Difficult to learn	1
	28

To gain information on use of features and functions of the product, a list of 32 features and 24 functions was provided to participants. Of the features listed, the three used most frequently include searching cd files (96%), searching local file (91%), and initiating batch processing (88%). Less frequently used were local card printing (21%), word proximity option (14%), and search terms option (11%). Of the function keys provided, the

quit key and close window key have been used the most (87% and 68%, respectively). The zoom, size, and move window keys are used least (16%, 12%, 10%, respectively). Of the current features and functions, only 17 were listed as needing improvement. In most cases, users wanted the ability to perform the feature or function more easily and/or with fewer steps involved. As stated in Table 6, users desired the most improvements in label printing and local catalog card printing.

TABLE 6

CURRENT FEATURE/FUNCTION IMPROVEMENTS

	Number	Percent
Label Printing	5	28%
Local Catalog Cards Printing	4	24%
Update Function	3	18%
Constant Data	2	12%
Export	1	6%
View Results	1	6%
	17	100%

Participants were asked to rank nine changes that are being considered as enhancements by the database provider. Batch searching of CD's was ranked as first choice by most users, with the ability to mark records for label printing from the truncated list as second. Printing a single local shelflist card instead of an entire set of cards and the ability to export bibliographic records singly into a local system also ranked highly.

Respondents were asked to identify one feature or function which they would like improved. Table 7 reflects user's desired new features and

functions. Thirty-seven percent of the suggestions involved the functionality of the software. Currently, many functions of the software are separated by two engines: one with the local file and one with the compact discs. Eleven percent of the users would like these functions combined into one. Overall, they wish to simplify and stabilize the software.

Thirty-two percent of the suggestions dealt with desired changes to the local file. Currently the local file is retrieved in alphabetical order, and 16% of those desiring change wished for the ability to retrieve in orders such as date/time added, local record number, etc. Also, users desired a more stabilized local file that does not get corrupted and the ability to delete the entire file in one step.

Twenty-six percent of the recommended changes concerned compact disc searching. Faster searching is highly desired, along with the ability to batch search the compact discs. Currently only three discs can be searched at one time, and some users would like to search more. Two users mentioned improvements to overall searching such as searching by derived search keys instead of keyword.

When asked which feature or function could be deleted, only nine were listed. Only one was listed twice and all others were only mentioned by one participant. These include cut text, unmark text, size window, and move window, to name a few.

TABLE 7

DESIRED FEATURES/FUNCTIONS

	Number	Percent
Functionality		
Combine local file/cd	5	11%
Improve batching	5	11%
Cursor/arrow keys	3	6%
Improve Online search	2	5%
Simplify setup	1	2%
Stabilize software	1	2%
Local File		
Retrieval order	7	16%
Stabilize	3	6%
Delete entire file	2	5%
Provide multiple files	2	5%
CD Searching		
Speed	6	11%
Changing discs	2	5%
Provide batch searching	2	5%
Searching	2	5%
Other		
Improve documentation	2	5%
	45	100%

If user recommendation can be a basis for judgement, this cataloging product seems to be doing very well. Sixty-nine percent of the participants would recommend the product as it works currently. Hopefully this number will increase with the implementation of the suggestions gained by this user survey.

TABLE 8

WOULD YOU RECOMMEND?

	Number	Percent
Yes	65	69%
Maybe	17	18%
No	7	8%
Don't know	5	5%
	94	100%

FOLLOW-UP AND CONCLUSIONS

The results from this user survey brought much valuable information. Most importantly, it furnished feedback from current users to the product managers. This information has been shared with managers and developers, and changes and enhancements are in the works.

Overall, the survey showed positive responses from current users. As stated previously, 82% of the users reported that they either like it or like it very much. Sixty-one percent prefer the compact disc product to the online system, and 69% of the users would recommend it to similar libraries. As Table 9 illustrates, these percentages remain somewhat consist among library types.

In the initial telephone calls to users, five were identified as no longer subscribing to the product. This information was used to clean up in-house record keeping. All five had cancelled their subscriptions, and the records now reflect this.

Some users had listed features or functions as desired enhancements that were already available with the software. Also, some of the problems listed with the software had been fixed in the latest version. By reviewing these comments, 16 users were telephoned for follow-up on their concerns. Many of the problems had been resolved with the current software. Documentation was reviewed for such areas which users did not understand.

The list of compatible hardware was updated to reflect all types of hardware currently used successfully with the product. This has been shared with the product managers and the marketing staff.

TABLE 9

RATINGS BY LIBRARY TYPE

Product Rating

	Overall	Academic	Special	Public	School
Like it very much	44%	45%	39%	44%	50%
Like it	38%	40%	44%	25%	38%
Neither	13%	11%	13%	19%	12%
Don't like it	4%	2%	4%	12%	0%
Don't like at all	1%	2%	0%	0%	0%
	n=94	n=47	n=23	n=16	n=8

Preference

	Overall	Academic	Special	Public	School
Compact disc	61%	53%	70%	63%	75%
Online	21%	22%	13%	25%	25%
No preference	18%	25%	17%	12%	0%
	n=92	n=45	n=23	n=16	n=8

Recommendation

	Overall	Academic	Special	Public	School
Yes	69%	75%	60%	57%	88%
Maybe	18%	15%	22%	25%	12%
No	8%	6%	9%	12%	0%
Don't know	5%	4%	9%	6%	0%
	n=94	n=47	n=23	n=16	n=8

Fourteen libraries were identified as institutions which required changes to their workflow. These were incorporated very successfully. All 14 libraries gave excellent marks to the compact disc product and prefer it to the online catalog. Each will be contacted to gain more individual practices to be shared with other users.

All information gained from this survey will be incorporated into future releases of software. This fairly new product received somewhat high marks from most current users. With their input and the development of new technology, this compact disc cataloging product looks to have a successful future.

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APPENDIX A

SECTION 1: SYSTEM EVALUATION

1. Overall, how do you like using the system?

    1. Like it very much
    2. Like it
    3. Neither like it nor dislike it
    4. Don't like it
    5. Don't like it at all

2. Why is that?

3. Which do you prefer to use for cataloging?

    1. The compact disc product
    2. The online system
    3. No preference

4. What was your library's <u>main</u> reason for purchasing the system?

    1. Reduce telecommunications cost
    2. Perform cataloging tasks on a more flexible schedule
    3. Reduce dependency on telecommunications lines
    4. Improve efficiency of cataloging
    5. Reduce cataloging costs by accessing the online system during nonprime hours
    6. (Other: _____)

5. Was the main reason (Question 4) for purchasing the system achieved?

    1. Yes
    2. No
    3. Don't know

6. How has the system affected your library's cataloging workflow?

    1. Your workflow did <u>not</u> change
    2. Your workflow changed and cataloging is now <u>more</u> efficient
    3. Your workflow changed and cataloging is now <u>less</u> efficient

7. Which of the following system features do you and other cataloging staff use at your library? (Circle all that apply.)

1. Search CD files
2. Search local save file
3. Search online files
4. Save search key
5. Validate record
6. Delete record
7. Produce holdings
8. Extended produce holdings
9. Update holdings
10. Cancel holdings
11. Save constant data
12. New record
13. Workform
14. Display catalog card
15. Display spine label
16. Local file status
17. Immediate batch processing
18. Export records
19. List online search keys
20. View results of batching
21. Later batch processing
22. Print catalog cards
23. Batch print labels
24. Print batch reports
25. Print local save file
26. Apply constant data
27. Save search terms
28. Holdings check option
29. Set card printing option
30. Set online authorization
31. Set truncated entries
32. Set word proximity

8. The system function keys are listed below. Please indicate which keys you and other cataloging staff use at your library.

1. Quit
2. Help
3. Last menu
4. Main menu
5. Prev window
6. Next window
7. Size window
8. Move window
9. Close all
10. Zoom window
11. Close window
12. Save/Cont
13. Copy text
14. Cut text
15. Clr fields
16. Clr text
17. Paste text
18. Advance line
19. Unmark text
20. Mark text
21. Prev record
22. Next record
23. Logoff
24. Break

9. Which one feature (Question 7) or function (Question 8) would you like improved? How should it be improved?

Name of Feature/Function	Improvement
_____	_____

10. Which one feature (Question 7) or function (Question 8), if any, would you like deleted? Why is that?

Name of Feature/Function	Reason
_____	_____

11. We are considering making changes and adding some features to the system. Help us to identify <u>your</u> preference by ranking these changes or additions from 1 to 9 where "1" means <u>most</u> desirable, "2" means next most desirable and "9" means <u>least</u> desirable. If any changes or additions do not apply, indicate "NA". Use each rank only once.

Rank	Changes and Additions
____	Batch searching of CD
____	Eliminating publication date as an indexed field for searching
____	Exporting authority records into local system
____	Exporting bibliographic records one by one into local system
____	Formatting Canadian call number for local printing
____	Marking a block of records for label printing from a Local Save File truncated entry list rather than from individual records
____	Modifying label printing file with your word processing software package
____	Printing a single shelflist card
____	Supplying a blank 09x field in CD records for local call numbers

12. Besides the selections in Question 11, what <u>new</u> feature of function key, if any, would you like added?

13. Based on your experience with the system, would you recommend it to other similar libraries that need a product like this?

    1. Yes
    2. Maybe
    3. No
    4. Don't know

14. Why would you recommend or not recommend?

15. Which compact disc subsets does your library currently own? After your subscription runs out, how likely are you to subscribe to other subsets?

16. Do the currently available compact disc subset subscriptions meet your library's needs?

    1. Yes (SKIP TO QUESTION 18)
    2. No (GO TO QUESTION 17)

17. What <u>new</u> subsets would meet your library's need?

18. Do you think the system has helped to <u>reduce</u> your library's cataloging <u>costs</u>?

    1. Yes
    2. No

19. Why is that?

SECTION 2: ABOUT YOUR USE

1. Approximately how many months has your library used the system?

_____ Months

2. After you installed the system, approximately how many weeks did it take you and others to be able to use the system for your cataloging?

_____ Weeks

3. Approximately what percent of your library's current cataloging is done with the system?

_____ Percent

4. Will this percentage increase, decrease or remain about the same 12 months from now?

   1. Increase
   2. Decrease
   3. Remain the same

5. During a typical week, approximately how many searches do you and others perform using the system's authority file at your library?

_____ Searches per week

6. What brand and model of microcomputers does you library use with the system?

Brand	Model	Number of Microcomputers

7. What brand and model of compact disc readers does your library use with the system?

Brand	Model	Number of Readers

8. How does your library access the online system?

   1. Dial access
   2. Dedicated line

9. Does your library currently own or plan to own an automated local system that has a circulation control module or online public access catalog?

   1. Yes, currently own (GO TO QUESTION 10)
   2. No, but plan to (GO TO QUESTION 10)
   3. No, and have no plans to own one (SKIP TO QUESTION 12)
   4. Don't know (SKIP TO QUESTION 12)

10. From which vendor did your library purchase or plan to purchase the local system?

   1. CLSI
   2. Data Research Associates (DRA)
   3. DYNIX
   4. GEAC
   5. INLEX
   6. LS/2000
   7. NOTIS
   8. Our local system was developed in-house (If it was based on a vendor's system, indicate the vendor: _____)
   9. (Other: _____)
   10. Don't know

11. If your library <u>currently</u> uses a local system, how do you load all or some of your bibliographic records into your system? (Circle <u>all</u> that apply.)

   1. Load a MARC tape
   2. Download bibliographic records from the online system
   3. Import bibliographic records from the compact disc system
   4. (Other: _____)

12. If we would like to find out more about libraries' system usage, may a representative call you?

   1. Yes
   2. No

APPENDIX B

LOCAL AUTOMATED SYSTEMS OWNED BY SURVEY PARTICIPANTS

CLSI
Columbia Library System
Data Research Associates (DRA)
Datatrek
DYNIX
GEAC
Innopac
Intelligent Cataloging
International Library Systems (Sydney)
Library Technologies, Inc. (Bib-base)
LS/2000
NOTIS
UTLAS
VTLS
Winnebago
Developed in-house

CD READERS USED WITH COMPACT DISC PRODUCT

AMDECK
Hitachi
IBM Boxer
Toyo

HARDWARE USED WITH COMPACT DISC PRODUCT

PC (8088 processor) Sold By Company - 11
PC (80286 processor) Sold By Company - 30
PC (80386 processor) Sold By Company - 4
Other Brands* - 32

*List of Other Brands
(Unedited, As Reported By Participants)

ACR Model 10
AST 286
Challenger XT/XAT
COMPQ 286
Dell System 325
Epson Equity III+
Express Micro 286
Fujikama 286
IBM AT
IBM Capatible
IBM Graphics Epson MX 80
IBM PC XT
IBM PS2
Leading Edge
Micro-Mini Comp 286
MMG 386/20
Northgate 286
Panasonic Business Partner
PC-Design GV-286
Tandy 3000 NL
Wyse PC 286 2112
Wyse WY 3216
Zennith ZCM 1390-A